Transformational Collaborative Outcomes Management Training Operations Plan

Background

The initial 5 day Transformational Collaborative Outcomes Management (TCOM) training was held from April 27 – May 1, 2015 at the County of San Bernardino Health Services (CSBHS).

Chapin Hall provided the training which was a classroom/discussion based environment where attendees were required to participate in up to 3 days of training depending on their role with TCOM.

Implementation of the utilization of TCOM (i.e., Child and Adolescent Needs and Strengths (CANS) and Adult Needs and Strengths Assessment (ANSA) will be done within the department by the following dates:

- CANS-SB – 7/1/15
- ANSA-SB – 10/5/15

CANS-SB or ANSA-SB will be deployed in both paper and electronic format for all clinicians to use immediately when seeing consumers.

Purpose

The purpose of this document is to provide a detailed outline of the TCOM Training Operations Plan. The TCOM framework supports the use of various communimetrics measure tools, including the CANS-SB/ANSA-SB. Communimetrics is a theory of measurement based upon six key principles.

TCOM is a conceptual framework for managing very complex systems in a behavioral health setting. Within the TCOM framework, there is a philosophy, a strategy, and a set of tactics all designed to facilitate an effective and integrated approach to addressing the needs of people. The Department of Behavioral Health (DBH) is currently integrating the TCOM framework into the daily care of consumers within San Bernardino County. The TCOM framework consists of the following tools:

Child and Adolescent Needs and Strengths (CANS): The CANS-SB is a standardized assessment tool that we all can use to work towards meeting the needs of children, youth and families through a strength-based needs-driven approach.

Adult Needs and Strengths Assessment (ANSA): The Adult Needs and Strengths Assessment (ANSA) is a multi-purpose tool developed for adult behavioral health services to support decision making, including level of care and service planning, to facilitate quality improvement initiatives, and to allow for the monitoring of outcomes of services. The copyright for the ANSA-SB Information Integration Tool is held by the Praed Foundation. Information on guidelines for use and development can be obtained by contacting the foundation at praedfoundation@yahoo.com.

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Objective Arts (OA): Objective Arts is a secured, proprietary, web-based data collection and reporting system that allows DBH and DBH contractors to provide regular periodic TCOM assessments to measure treatment outcomes of consumers as they participate in various mental health programs. The system includes immediate access to multiple providers, an online measurement tool, individual and collective data sharing, and the ability for users to access/monitor client information while complying with Health Insurance Portability and Accountability Act (HIPAA) of 1996 requirements.

This plan is an organic means to both develop and maintain the training processes for TCOM, including certification and utilization. The training plan will provide a detailed outline on how, who and when training will be offered, and will be divided into several parts including:

- Initial training
- Ongoing TCOM training/certification for existing staff
- Ongoing/Refresher TCOM training/certification for new staff
- Objective Arts training for staff accessing and using the system
- Subject Matter Experts for TCOM and OA

Learning Objectives

Upon completion of the TCOM training program, participants will be certified to use the CANS-SB and ANSA-SB, have a thorough understanding of how they integrate into the clinical environment, and how to operationalize the tools within clinical supervision.

The learning objectives for TCOM are outlined in the bulleted list below:

- Describe the six key characteristics of communimetrics tools (e.g., CANS-SB/ANSA-SB).
- Increase knowledge regarding collaborative assessment and treatment planning.
- Name the three TCOM strategies relevant to working with individual children and families.
- Describe how to collaboratively rate child and family needs, using action ratings.
- Use action ratings to collaboratively rate child and family strengths.
- Obtain TCOM certification with certification levels as follows:
  - Clinical line staff minimum score = 0.70
  - Supervisory staff minimum score = 0.75
  - Training staff minimum score = 0.80
- Learn how to utilize Objective Arts, including:
  - Data entry of assessments
  - Generation of individual client reports

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Ongoing Certification/ Recertification Training and Approach

TCOM:

TCOM certification will be a two part process including an interactive training and an online certification exam taken at www.canstraining.com.

Ongoing in-person TCOM certification/re-certification training will be scheduled once per month (or as required) and will be tracked in Relias. All staff who will be utilizing a TCOM measure, as designated by the unit, must be certified in the measure within 7 days of training. Ongoing training will be facilitated by DBH personnel who have been trained as Trainers for TCOM.

TCOM in-person training will be given the day after New Employee Orientation (refer to Relias for exact dates) and will consist of an 8 hour training course. Class sizes may vary depending on need, but will consist of clinicians from different clinics to allow for coverage.

Attendance at a TCOM certification training does not equate to TCOM certification. Attendees will also have to pass the TCOM certification exam.

After each training session, all attendees will be given a coupon code to access and take the TCOM certification exam. Each attendee must pass the certification exam within 7 days of taking in-person TCOM training. The website to take the exam is www.canstraining.com.

Continuing education credits (CEs) will be issued after each attendee has successfully passed the TCOM certification exam.

Most staff will attend in-person certification training and take the certification exam online. In the case that a staff member is not able to attend in-person training (upon program manager approval), the staff member will be given a coupon code to take the online training, followed by the online certification exam at www.canstraining.com. CEs will not be given to staff who does not attend in-person training. All DBH Interns will be trained by the Intern Supervisors as part of Intern Orientation.

1. CANS/ANSA training structure - Both CANS-SB and ANSA-SB personnel will meet at the same location at the same day and time, and follow the outline below:
   a. Background, theory and history of TCOM
   b. Collaborative processes
   c. Implementation at the clinic level
   d. Application at the clinic level
   e. Domains and (selected) items review for CANS-SB/ANSA-SB
   f. Practice vignette
   g. Mini vignette
   h. Group work – rating of vignettes
   i. TCOM Certification Exam

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2. Subject Matter Experts (SMEs) - Currently, DBH and its contract agency partners have 54 Trainers for TCOM. These trainers are spread throughout DBH, and will act as SMEs for people who have questions regarding the clinical use of TCOM, or certification for TCOM.

TCOM Renewal/Refresher Training: When certification renewal is necessary for a staff member, the staff member will acquire a (previously mentioned) coupon code from Workforce Education and Training (WET), then take the TCOM certification exam online. Should the staff member require refresher training to assist in passing the exam, the staff member will enroll in the next available TCOM training class. All DBH staff will also have access to a TCOM trainer/SME at their location for any in-depth assistance with TCOM.

Additionally, training in Objective Arts will be available for all staff who will utilize the system.

Objective Arts:

Ongoing live Objective Arts (OA) training will be a course for DBH staff utilizing TCOM. One course will be scheduled for July, one course per week will be scheduled for August, and as needed in September of 2015. One course every other month will be scheduled beginning October, November and December of 2015. Starting in 2016, one course every month will be scheduled as ongoing training. An Adobe Connect option is available for DBH staff in remote areas. If a staff member is unable to attend in-person OA training, please contact the DBH Training Institute to arrange for a remote login via Adobe Connect.

The OA training will be broken down as follows:

- Objective Arts (OA) Training is given to clerical staff, clinicians, supervisors, and administrators who will be using Objective Arts. Once a staff member has completed OA training, they will be given an OA production site username and password to start inputting data into OA immediately. OA users and roles will be determined by the business processes at each clinic/program. Users who enter assessments into OA will be determined by the business processes at each clinic/program. Users who enter assessments into OA will be determined by the business processes at each clinic/program. OA training covers:
  - Entering assessments directly into OA and printing a score sheet or TCOM comparison report. This can be done by the following OA roles: clinical staff, office assistants, supervisors, clinical administrators and domain clinical administrators.
  - Creating and Updating user accounts. This can be done by the following OA roles: office assistants, supervisors, clinical administrators and domain clinical administrators.

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- Approve/Reject CANS-SB/ANSA-SB. This is done by supervisors, clinical administrators and domain clinical administrators, but it is covered when going over other administrative tasks that Office Assistants will learn.
- Pulling and printing OA reports. This is done by all OA roles except the clinical staff role. These reports are more for administrative purposes.
- Batch Upload Training – is conducted at the end of OA training to clerical staff only, and includes instructions on data entry into a Microsoft Excel document and then uploading that document to Objective Arts.

Both clinical and clerical staff will attend the same OA training sessions in order to learn how each classification utilizes the system. It is crucial that both clerical and clinical staff understand how each other utilize OA, as each clinic may use OA differently with varying business processes. Each OA training will be 3 hours in length and broken down as follows:

- Hours 1 and 2 – Clinicians staff including supervisors
- Hour 3 – Clerical staff only

Objective Arts Refresher: Objective Arts Refresher training for OA consists of a 1 hour online course on Relias that staff may take at their leisure. Should the staff member require additional instruction or assistance with OA, they may contact their clinic Subject Matter Expert as outlined below.

Subject Matter Experts (SMEs) - There is a need for SMEs for OA. Once administrative and clinical personnel begin using the OA program, they will need someone at their location as a point of reference to ask questions regarding OA. OA trainers will compile a list of potential OA SMEs to be approved by PMs. Should the SMEs require assistance, the SME will submit an inquiry to the DBH-OA@dbh.sbcounty.gov.

Supervisor's:

Coming in the future!

Materials
Handouts Needed for certification trainings:

- CANS-SB Materials
  - CANS-SB Manual
  - Glossary
  - Vignette
  - Score Sheet
  - Supervision Square
  - CANS-SB integrated Clinical Assessment

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- o How to Navigate CANS Training Website Document
- ANSA-SB materials
  - o ANSA-SB Manual
  - o Glossary
  - o Score Sheet
- Materials for Objective Arts Trainers
  - o OA Training Manual – Administration
  - o OA Training Manual – Clinical Data Entry
  - o Tickler Report
  - o TCOM Score Sheet

Evaluation

During training, each attendee will be given a training evaluation form. Upon the completion of the initial training session, these forms will be filled out and returned to the trainer. The trainer will then return the forms to WET to be compiled into a single report and ultimately returned to the TCOM Steering Committee for further evaluation.

For additional evaluation, attendees will be surveyed and/or met with by the TCOM Steering Committee to see how the training affected their knowledge and use of TCOM in the clinical environment. Depending on the evaluation and follow up questions, the TCOM Steering Committee will make any necessary adjustments to future trainings in order to better implement the systems for clinical use. Any and all adjustments will be made to this training plan as a result of the evaluation forms that are filled out and returned to WET, along with the follow up questions for clinicians.

Follow-Up

A report will be run on the Praed Foundation website 7 days after in-person TCOM training to confirm that all trainees have taken and passed the TCOM certification exam. If a participant has not taken or passed the certification exam, an email will be sent to the participant's clinic supervisor, with a CC to the program manager for the program. The supervisor will assign a TCOM Trainer to offer any assistance to the participant to achieve a passing score.

Clinicians will be assessed by supervisors as to how they are using TCOM, how it is affecting their job, and how the consumers appear to be responding to the TCOM systems. This will be done in regular supervision.

If follow up is needed, additional training will be given on a case by case basis for the clinician via either DBH personnel or the www.canstraining.com website.